Financial Advisor Recommendations :

I emailed a financial advisor from Conte Wealth Lena RizKallah for some suggestions on my financial situation. She responded back and asked some questions like my age, household size, questions about my risk tolerance, level of liquidity within my assets and my objectives and expectations. Based off my responses she recommended, that I use discount brokerage firms like fidelity, Charles Schwab, E*trade and any robo advisory platforms out there as that seems like the best solution for my current situation. As far as the charitable remainder trust, she doesn't know why it would be necessary because it is usually for individuals with highly appreciated assets who want to avoid taxes and receive a lifetime income stream, she recommended that I speak with an attorney regarding my course of action.